Handout – Collection Development Reports

Polaris Report: *Collection Count by Code – MLS*

Utilities > Reports and Notices > Custom > Collection County by Code – MLS

Tip: Run this report before you start any weeding, inventory or collection development project.

Recommended: Run this report once a year for a temperature check on the accuracy of your collection codes.

Polaris Report: *Local Hold Requests and Item Counts by Branch*

Utilities > Reports and Notices > Circulation > Holds > Local hold requests and item counts by branch

Tip: Run once a quarter, look at the ration differences. Good report for small/medium libraries

Simply Report: Hold Count, Requests vs. Holdable Items

Holds > Hold Count Reports

Output: MARC Browse Author, MARC Browse Title, MARC Primary Type of Material, MARC Publication Year

Optional filters:

- Number of requests: greater than 5 (or any number you choose)
- Number of holdable items: equal to 0 (or any number you choose)
- Assigned branch: choose your library

Hold general filters:

- Pickup Branch: choose your library

Polaris Report: *Top Circulation Titles by Collection*

Utilities > Reports and Notices > Circulation > Top Circulation Titles by Collection

Tip on timeline: Do this monthly or bi-monthly. Your report may time-out if you choose a year.

Simply Reports: Most Circulated (i.e. Popular!) Items in a Collection – Previous Year

Items > Item List Reports

Output: MARC (title, author), Item Call Number, Item YTD Circ Count

Sort: Item YTD Circ Count

Item general filters:

- Branch
- Record Status: Final
- Collection: Recommend if you are a larger location

Item circulation filters:

- YTD circulation: Greater than or equal to: choose number

Polaris Report: *Patron Circulation Statistics*

Utilities > Reports and Notices > Circulation > Patron Circulation Statistics

Tip: Breakdown by patron code

Polaris Report: *Patron Circulation by Statistical Class*

Utilities > Reports and Notices > Circulation > Patron Circulation by Statistical Class by Month

Simply Report: Circulation by Collection

Items > Item Statistical

- Statistical categories: Check out
- Available subcategories: Item assigned collection code
- Report type: Monthly
- Run report by transacting organization only > choose your library
- Date Range: Monthly to start (Tip: schedule report to run overnight if you want a longer time period)

Simply Report: Circulation by Material Type

Items > Item Statistical

- Statistical categories: Check out
- Available subcategories: Item material type
- Report type: Monthly
- Run report by transacting organization only > choose your library
- Date Range: Monthly to start (Tip: schedule report to run overnight if you want a longer time period)

Simply Report: Age of Collection

Items > Item Count

Output: Item assigned collection name, MARC pub year

Item general filters:

- Assigned branch: choose your library
- Record Status: Final

Simply Report: Circulation by Dewey Range

Items > Item Count

Output: Item assigned collection name, Sum YTD circ count

Item general filters:

- Assigned branch: choose your library

- Record Status: Final

Item Call Number Filters

- Choose call number range